

0910.01 State Government Records

Issued January 1, 1994

SUBJECT: State Government Records.

APPLICATION: Executive Branch Departments and Sub-units.

PURPOSE: To instruct State agencies how to manage their records, in order to provide for the administrative, fiscal, legal and historical needs of State government and to protect the rights and safety of its citizens.

CONTACT AGENCY: Department of Management and Budget (DMB)
- Office Services, State Records Management Services Section
3405 N. Logan/King Blvd.
Lansing, Michigan 48913.

TELEPHONE: 517/335-9132

FAX: 517/335-9418

SUMMARY: In order for State government to function administratively, undergo periodic audit, provide for its legal requirements and document its heritage, it must manage its records properly. Therefore, each Executive Branch Department and Sub-unit shall designate a person as its Records Management Officer, to serve as a liaison and assist in maintaining a records management program.

APPLICABLE FORMS: DMB-501, Records Transmittal Form.
DMB-502, (Records Center) Container Label.
DMB-504, Retention and Disposal Schedule.
DMB-508, Records Referral Order Form.
DMB-509, Records Referral Outcard.
DMB-510, Central Microfilm Job Order Form.
DMB-511, Records Disposal Notice.
DMB-594, Transmittal of Electronic Media to Off-site Storage.
MH-22, State Archives Container Label.
MH-85, Direct Records Transmittal - Archives.

PROCEDURES:

State Records Management Services Section:

- Inventories agency records and prepares Retention and Disposal Schedules.
- Submits a proposed Retention and Disposal Schedule for approval by the necessary authorities, which includes the respective agency, the Auditor General, the Attorney General, the Bureau of History of the Department of State and the State Administrative Board.
- Conducts recordkeeping system studies and analysis.
- Reviews and approves agency recordkeeping methods, procedures, equipment and technologies.
- Makes available, to staff of all agencies, information and training on recordkeeping techniques, rules, regulations, procedures and technologies.
- Operates the State Records Center, to provide off-site storage services for all types of State government records, including paper records, microfilm, magnetic media, and other forms of documentation.

- Provides authorized agency staff full access to records stored in the State Records Center.
- Provides for disposal of records that are stored in the State Records Center, by submitting Records Disposal Notices to the Records Management Officers of the respective departments and to the Bureau of History, Department of State.
- Maintains a centralized microfilming service facility.

Agency:

- Is required to have its records listed on a Retention and Disposal Schedule.
- Must submit a written request to the Records Management Services Section, in order to have a records analyst prepare a Retention and Disposal Schedule.
- Must have a designated departmental Records Management Officer, to assist in preparing Retention and Disposal Schedules and in other records management related activities.
- Must review, approve and sign its Retention and Disposal Schedule.
- May keep records in the office, transfer them to the State Records Center for off-site storage and dispose of them in accordance with the provisions of its Retention and Disposal Schedule.
- Within 30 days of receipt, must review, approve and return to Records Management Services the Records Disposal Notices that it receives for the disposal of its records.

Department of State, Bureau of History:

- Reviews Retention and Disposal Schedules and indicates which records are to be transferred to the State Archives once they have fulfilled their retention periods in the agency and at the State Records Center.
- Reviews Records Disposal Notices and, within 30 days after receipt, returns to the Records Management Services Section a listing of the records which have been selected for transfer to the State Archives.

Auditor General:

- Reviews and approves Retention and Disposal Schedules.

Attorney General:

- Reviews and approves Retention and Disposal Schedules.

State Administrative Board:

- Reviews and approves Retention and Disposal Schedules.

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Procedure 0910.01